#### Client details form - individual tax return

|  |  |
| --- | --- |
| **Full Name** |  |
| **Tax File Number** |  |
| **Date of birth** |  |
| **ABN (if applicable)** |  |
| **Address** |  |
| **Address (postal)**  (Put ‘as above’ if the same) |  |
| **Telephone contacts** | **Mobile:** |
| **Business Hours (work) :** |
| **After Hours (home):** |
| **Email** |  |
| **Electronic banking Details**  (for refund if applicable) | **BSB:** |
| **Account Number:** |
| **Occupation** |  |
| **Do you run your own business as a sole trader?**  **YES/NO**  **Do you run your own business in a company, trust or partnership?**  **YES/NO** |

|  |  |
| --- | --- |
| **Spouse’s full name**  **(Please include married/de facto/same-sex)** |  |
| **Spouse’s date of birth** |  |
| **Spouse’s TFN** |  |
| **Approximate Income (if known)** |  |

***Client details form continued*** …

1. Do you have any dependants (children up to the age of 21, full time students under the age of 25, parents or parents in law) living with you?

**YES/NO**…………………If YES, please provide short summary of the details below:

|  |  |
| --- | --- |
| **FULL NAME** | **DATE OF BIRTH** |
| **1.** |  |
| **2.** |  |
| **3.** |  |
| **4.** |  |

1. Have you had a change in marital status during the income year? (Please circle)

**YES / NO**

1. Have you had a change in occupation or started a new job during the income year? (Please circle)

**YES / NO**

1. Have you had a change of address during the income year? (Please circle)

**YES / NO**

1. Did you buy or sell any property during the income year? (Please circle)

(e.g., shares, rental property, main residence)

**YES/NO**…………………If YES, please provide short summary of the details below:

|  |  |  |
| --- | --- | --- |
| **Type of asset (e.g., shares/ holiday home)** | **Date acquired (approx)** | **Price sold for**  **(approx)** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

1. Was last year’s return prepared by a registered tax agent (other than our firm)?

**YES/NO** …………………If YES, please provide short summary of the details below:

|  |  |
| --- | --- |
| **FIRM NAME and contact** |  |
| **FIRM address** |  |
| **Details of work done** |  |

***Client details form continued*** …

7. Where relevant, please provide details of the following types of income:

**Details of salary and wages**:

Where you have not been provided with either an employment income statement (available via your MyGov account) or PAYG payment summary (if provided to you from your employer where they have not reported your payment details to the ATO electronically via STP), please provide details of any relevant salary and wages (and any other similar payments) below:

|  |  |
| --- | --- |
| **Salary and wages** | **1** |
| Main occupation |  |
| Payer’s ABN |  |
| Tax Withheld: **$** | Gross Payment: **$** |

|  |  |
| --- | --- |
| **Salary and wages** | **2** |
| Main occupation |  |
| Payer’s ABN |  |
| Tax Withheld: **$** | Gross Payment: **$** |

|  |  |
| --- | --- |
| **Salary and wages** | **3** |
| Main occupation |  |
| Payer’s ABN |  |
| Tax Withheld: **$** | Gross Payment: **$** |

**Details of interest received**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Bank** | **Branch** | **Account number** | **Amount** | **Joint names?** |
|  |  |  |  |  |
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|  |  |  |  |  |
|  |  |  |  |  |
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**Details of dividends received (or reinvested on your behalf)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Company** | **Date Paid** | **Unfranked dividends** | **Franked dividends** | **Franking credits** | **TFN Amount** |
|  |  |  |  |  |  |
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**Details of cash management trust distributions received**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Trust** | **Amount** | **Franking credits** | **Trustee tax** | **TFN amount** | **Net capital gains** | **Other** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |

**Details of rental income received**

|  |  |
| --- | --- |
| **Rental Property** | **1** |
| Address |  |
| Rent received |  |
| Weeks rented |  |

|  |  |
| --- | --- |
| **Rental Property** | **2** |
| Address |  |
| Rent received |  |
| Weeks rented |  |

|  |  |
| --- | --- |
| **Rental Property** | **3** |
| Address |  |
| Rent received |  |
| Weeks rented |  |